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ABSTRACT

Based on the findings of an operations research project undertaken by the San Diego Community College District (SDCCD), this report presents recommendations for improving the organizational structure of SDCCD's payroll/operations department. The report first outlines 15 organizational and operations problems confronting the department as revealed by the operations research study, including bottlenecks in the flow of paperwork, a lack of communication between the two major components of the department, inadequate workspace, and the failure of personnel in other departments to fill out payroll forms on time and in accordance with codification procedures. After a discussion of the shortcomings of the department's present operational organization, which is structured by function rather than by workflow, the report describes radical, moderate, and marginal alternatives for departmental reorganization, along with the legal, administrative, physical, financial, political, and distributional constraints of implementing each alternative. Finally, the report provides recommendations for controlling the timeliness and accuracy of forms forwarded to the department, training employees for conversion to an on-line filing system, creating a more efficient work station design, and developing a procedures manual. Organizational charts are appended. (JP)

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Payroll / Operations Analysis

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2 Research / Planning

PAYROLL/OPERATIONS ANALYSIS

Conducted For:

PAYROLL-PERSONNEL PROJECT TEAM

Prepared By:

Research/Planning

January, 1980

This report is based upon information received from numerous District sources. The accuracy/validity of the information provided within this report is solely the responsibility of the source from which it is received. Any unauthorized additions or corrections not approved by Research & Planning Department invalidates the findings of this report.

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ANALYSIS ABSTRACT

Two system-shocks have recently impacted on the Payroll/Operations Department of Personnel Services:

1. Becoming fiscally accountable in July of 1979;
2. The development of on-line inquiry/direct-update, its partial execution, and the anticipation of near future 100% implementation.

These impacts have exacerbated ongoing Payroll/Operations operational problems. Examples include:

1. Ambiguity in roles, duties, activities, responsibilities, procedures, information/communication, organization, and work flow;
2. Problems with timekeeping locations;
3. Organizational and locational/structural problems.

The major hypothesis is that the organizational structure of Payroll/Operations is a major cause of many of the problems.

The methodology followed four modes of inquiry:

1. Naturalistic Observation;
2. Interviews;
3. Mapping of form flows/activities;
4. Questionnaires.

Based on the findings, recommendations were mainly threefold:

1. Recommendations for reorganizing;
2. Recommendations for timekeeping location problems;
3. Recommendations for miscellaneous problems such as inadequate on-line training of Payroll/Operations personnel; improper locations of key personnel as indicated in the master floor plan (renovation of Personnel Services' offices); and the need for development of a Payroll/Operations procedures manual and learning manual.

INTRODUCTION TO THE PROBLEM AREAS AND REASONS FOR THE ANALYSIS

BRIEF HISTORY

- July 1973, College District and the San Diego Unified School District administratively separate - SDCCD contracts with SDUSD to continue to receive payroll/personnel computer services (1).
- January 1976, SDCCD discontinues contract with SDUSD and initiates contract with San Diego County Department of Education to receive payroll processing services (2).
- December 1977, SDCCD installs its own computer system; County retains payroll processing (viz., fiscal accountability) (3).
- July 1978, Issue Paper conducted on on-line inquiry/direct-update for Payroll/Personnel system.
- August 1978, Board of Trustees adopts "Resolution and Application For Fiscal Accountability," pursuant to EDUCATION CODE 85266 for salary warrants only; application filed with San Diego County Superintendent of Schools and San Diego County Auditor/Controller (4).
- September 1978, Board of Trustees approves on-line plan; system is purchased from IAI.
- November 1978, Deloitte, Haskins and Sells selected as auditors to conduct survey of management and accounting controls (5).
- December 1978, auditors file report/audit study with County (6).
- July 1979, SDCCD becomes fiscally accountable.
- November 1979, Payroll/Personnel Project Team request services of Research/Planning to conduct analysis of Payroll/Operations prior to full "systems-go" of on-line Payroll/Personnel system.
- January 1980, Payroll/Operations project completed.

PRESENT PROBLEMS

When the analysis of the Payroll/Operations section of Personnel Services began in November of 1979, several pressing problems as initially described by Payroll/Operations personnel were impacting on their system:

1. Bottlenecks/delays in the flow of paperwork/transactions, including the location of position control-contract;

PRESENT PROBLEMS (continued)

2. Lack of smooth, efficient, and equitable workloads across all areas;
3. Constant turnover (especially in the Payroll area);
4. Low morale;
5. Lack of ability to assimilate and accommodate to the new status and methods of fiscal accountability and partial execution of on-line inquiry/direct-update;
6. Normatively, the Payroll subsystem's and the Operations subsystem's duties, activities, and responsibilities are supposed to fall under their respective functions: basically, Payroll to assume wage/salary adjustments and warrants, Operations to assume position control-hourly and credentials (non-unique). Prescriptively, the activities, duties, and responsibilities of the two areas have become partially overlapped, leading to duplication of effort and "too many fingers in the pie." This overlapping is a result of imbalanced workloads; one area attempts to assist the other area when it's busy, and vice versa.

Moreover, and subsequent to the analysis, additional problems were expressed by Payroll/Operations personnel:

7. Lack of communication and/or information across the two areas of Payroll and Operations;
8. Lack of cooperation from, and lack of awareness on behalf of site personnel despite past training sessions having been conducted;
9. The immediate need for 100% on-line, yet, anxiety over the anticipation of total on-line because of little on-line training regarding usage and concept;
10. Lack of standardized in-house procedures (viz., within Payroll and Operations, and across Payroll vis a vis Operations);
11. Troublesome record systems in the way of bulky runout books and hard copies of payroll/personnel records;

PRESENT PROBLEMS (continued)

12. Inadequate workspace - again, stemming from workers being "barricaded" by piles of runout books and hard copies of payroll/personnel records;
13. Too many interruptions - primarily exemplified by verifications of present/past employment of present/past District employees.
14. The system continually being in a reactionary state rather than in a desired state of planning and consideration of the downstream consequences of actions;
15. Lack of top-level management support in terms of requiring sites to adhere to deadlines and codified procedures (e.g., "get warrants out at all costs," even if, for example, a PASS Sheet is not in as required).

Of the fifteen recurring problems outlined above, only number 11 appears that it will be directly addressed when on-line is complete and when, and if, hard copies of records are microfilmed/microfiched. Problem number 12 can be addressed through the proper relocation of desks and other equipment to allow for adequate workspace and, as noted for problem number 11, by going 100% on-line and microfilming/microfiching hard copies of payroll/personnel records. With problem number 13, 100% on-line can also reduce the frequency of employment verification telephone calls received by Payroll/Operations in that this role can (and should) be assumed by the sites who will also have access to CRTs.

The remaining problems (numbers 1-10, and 14 and 15) however, will continue (and will probably be exacerbated) when the system is fully implemented. The view that these problems will continue, if not worsen, when on-line is 100% implemented is based upon the following hypotheses:

1. Problem numbers 1-7, and 14 and 15 are symptomatic of the organizational structure of Payroll/Operations - treating the symptoms will not address the root cause - that cause being an inadequate structure;

2. To address the root cause of the problems directly, the structure must be altered;
3. The present structure was necessary at one time; however, it is presently an anachronism and is not conducive to a high-technology, high-volume on-line environment;
4. A new structure can be developed that is conducive to a high-technology, high-volume on-line environment.

Organizational restructuring, in and of itself, however, is not a panacea. For example:

- Problem number 8 would have to be addressed via an Organizational Development (OD) approach as past efforts to train site personnel in adhering to procedures have failed (see: RECOMMENDATIONS FOR PROBLEMS OF SITE/TIME-KEEPING LOCATIONS) (7);
- Part of problem number 9, in a sense, "takes care of itself"; a system goes on-line or does not go on-line. The anxiety, however, does not "take care of itself" and will only be reduced by thorough on-line training (see: RECOMMENDATIONS: ON-LINE TRAINING);
- Problem number 10 should be addressed through a teams-approach; management and operatives together should develop codified procedures for day-to-day operations (see: RECOMMENDATIONS: DEVELOPMENT OF A PROCEDURES MANUAL).

The remaining problems (numbers 1-7, and 14 and 15) hoped to be resolved through restructuring would also require follow-up in the way of an OD approach. Old habits, rigid styles and systems, poor modes of dealing with conflict, and many other undesirable behavior need OD follow-up because they have been so adhered to under the present structure. OD would help carry through the desired momentum of change.

THE ANALYSIS

It was decided that four modes of inquiry would be pursued:

1. Direct naturalistic observations;
2. Unstructured interviews;
3. Open-ended questionnaires;
4. Mapping of form flow and their respective activities.

It was assumed from the start that many disclosed and undisclosed problems, as well as some of the answers to these problems, could be elicited from the employees of Payroll/Operations themselves. Thus, by asking the proper questions, much of the key information as to what the problems were all about, and what might address these problems could be provided.

The direct observations were conducted by spending several hours with the employees, observing day-to-day operations, and asking questions when the rationale behind a function or activity was unclear. This allows the analyst to vicariously get the "feel" of these operational problems and how they not only affect the employees as individuals, but also the employees' workgroups and informal groups as wholes. The open-ended questionnaire was direct and simple - it concerned two areas:

1. The listing by the employees of the top three problems that affect their respective work units; and
2. A sociomatrix of work interaction of employees to:
   a. Empirically verify the nuclei-personnel of Payroll/Operations (i.e., those individuals in Payroll/Operations who, on an average basis, are most frequently sought by others from both areas to either give information to or seek information from);
   b. Assess possible ideal locational structures when Payroll/Operations is relocated/renovated.

Finally, flow charts were mapped out on the most frequently used forms (where N=69 forms). The forms themselves were categorized into:

1. Internal Forms, non-input;

2. Internal Forms, direct input;
3. State and Federal Forms, non-input;
4. State and Federal Forms, direct input;
5. Time Input Forms, direct input;
6. Trans Forms, direct input.

These categorizations can later serve as a check-off list prior to 100% on-line; i.e., what forms will remain? What forms will disappear? What new forms will have to be developed?

The rationale behind the flow mapping was:

1. To look for bottlenecks, points of delay in the flow;
2. To help empirically validate the hypothesis of improper organizational structure;
3. To provide a comparative basis of "before-and-after" in terms of showing what the flow looks like now vs. how the flow would change if any one of the three alternatives for organizational restructuring were opted for.

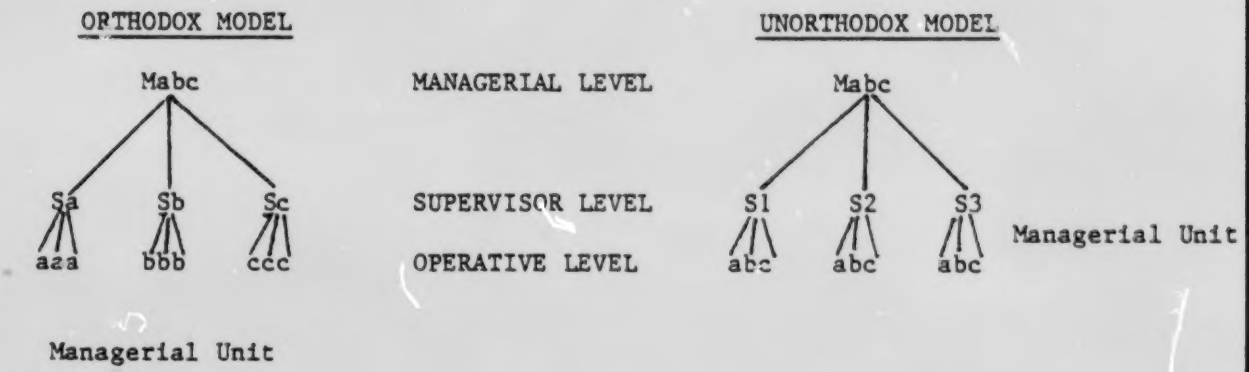
FINDINGS: INTERNAL PROBLEMS

As previously noted, the subsequent findings were problem numbers 7-15. Also, it was noted that problems numbers 1-7, and 14 and 15 were hypothesized as being symptomatic of a deeper rooted problem - that of organizational structure.

Let's delve into this concept by first looking at two extreme (but simplified) models of organization and their implications. The first model, the Orthodox Model, is primarily based on organization by function (this is how Payroll/ Operations is presently organized; see Figure IV, Appendix) (8). The second model, the Unorthodox Model, is primarily based on organization by flow of work; that is, related activities are put together whether they are "like" or "unlike" (9).

FIGURE 1

THE ORTHODOX AND UNORTHODOX MODELS



ORTHODOX PROPERTIES	UNORTHODOX PROPERTIES
1. Authority is vertical/hierarchical.	1. Authoritative relations are up, down, and across and should be directed to similar goals.
2. Departments are organized around similar activities called functions.	2. Departments are organized around the flow of work; activities are put together whether they are "like" or "unlike."
3. Only a relatively small number of people should report to any superior.	3. A relatively large number of people may report to any superior.
4. "Management by Push."	4. "Management by Pull."

FROM BASIC EMPHASIS UPON:	TO GROWING EMPHASIS UPON:
1. Regularity in operations.	1. Creativity in concept, adaptability in execution.
2. Programmed decision.	2. Novel decisions.
3. Stable and simple competencies, technologies, and markets.	3. Volatile and complex competencies, technologies, and markets.
4. Stop-and-go processing.	4. Continuous processing.
5. Monolithic product lines, programs.	5. Variegated product lines, programs.
6. Stable product lines, programs.	6. Volatile product lines, programs.
7. Demands of hierarchy.	7. Demands of task, technology, profession.
8. Departmental orientation.	8. System orientation.
9. Expanding volume at central site.	9. Expanding volume through field units.

Referring to Figure I, several implications of each model can be drawn:

1. In the Orthodox structure, only Mabc can make a decision about the entire flow of work (a+b+c) - in essence, the managerial unit is very large; vs. in the Unorthodox structure, any S can make a decision about any flow respective to its own section or those of other Ss;
2. In terms of behavioral consequences, the Orthodox structure is needs-depriving in that there exists no "gestalt" as to the entire flow of the activity - it is piecemeal and frustrating; vs. in the Unorthodox structure, rather than section a, b, and c each doing their respective functions of a, b, and c (each a subpart of the product a+b+c), we have, for example, Section 1 doing a, b, and c, and there exists a gestalt as to the totality of the workflow - this is needs-conducive. (It has been well documented that moving towards a needs-conducive work environment can be quantitatively measured via greater productivity, less turnover, decrease in operation costs, etc.) (10);
3. The Orthodox structure is too rigid to accommodate itself to an increasingly technological work environment, whereas, the Unorthodox structure is flexible. Growing technological demands (e.g., going on-line) require increased synergism between functions, but the Orthodox Model inhibits this required collaboration, whereas, the Unorthodox Model promotes it (11);
4. The Orthodox structure is inadequate to accommodate itself to growth (i.e., increased demand in the amount and/or kinds of services/products required). The Unorthodox structure, on the other hand, is more flexible in its ability to respond to increased demands in amount and/or kinds of services/products required.

Figure II illustrates this comparative growth advantage as noted above.

FIGURE II

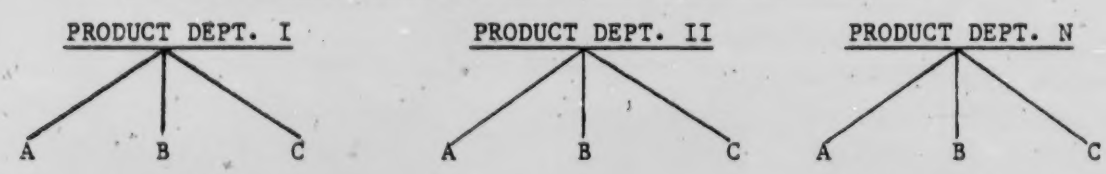
DEPARTMENTS AND PRODUCT PRIORITIES

PRODUCT PRIORITY RANKS	FUNCTIONAL DEPARTMENTS		
1 - 00	A	B	C
1	1	N	1
2	2	2	N
•	•	•	•
•	•	•	•
•	•	•	•
00	N	1	2

In Figure II, Department A prioritizes product 1 most highly, whereas, Department B prioritizes it the least. Assuming that we are under the Orthodox structure, by adding a new product, realignment of the priority rosters of the departments is required and organization conflict increases. Under the Unorthodox structure, adding a new product merely requires the establishment of one new product department. This can be seen in Figure III below:

FIGURE III

DEPARTMENTATION BY FLOW OF WORK: ADDING A NEW PRODUCT



FINDINGS: EXTERNAL PROBLEMS

It was noted earlier that there exists the problem of lack of cooperation from timekeeping locations in terms of not following procedures set down by Payroll/Operations. Examples include:

1. Ideally, PASS Sheets are to be turned in two weeks prior to an employee's new assignment (or new status). In practice, however,

FINDINGS: EXTERNAL PROBLEMS (continued)

PASS Sheets are often turned in well after a time card is sent in;

2. Frequently, PASS Sheets will come into Operations, but will never have a time card follow (i.e., the employee is "hired," but never works any hours). In fact, in one interview it was noted that of all PASS Sheets that are received by Operations, approximately 25% of these will never be subsequently followed by a time card (12);
3. When PASS Sheets do come in (whether late or on time), they are often filled out incorrectly. It cannot be stressed enough that even seemingly small errors create problems for Operations. This stems from there being over 150 timekeeping locations in the SDCCD. Representing these 150 timekeeping locations on a monthly basis are approximately: 3,300 Certificated Hourly employees; 1,500 Classified Hourly employees; 1,200 Contract personnel (classified and hourly); all totaling to 6,000 warrants per month, all assumed by 12 full-time workers (not including the Manager) and 3 - 4 part-time hourly workers (13).

What results is a multiplicity effect expressed as costly and unnecessary workloads.

RECOMMENDATIONS

Recommendations to address the stated problems are divided into three major areas:

1. Recommendations for reorganizing Payroll/Operations - three alternatives;
2. Recommendations for problems stemming from lack of site cooperation;
3. Miscellaneous recommendations based on findings.

RECOMMENDATIONS FOR REORGANIZING

Three alternatives were selected and ranked:

1. Radical reorganization, rank 1;
2. Moderate reorganization, rank 2;
3. Marginal reorganization, rank 3.

The criteria for ranking the alternatives (with a rank of 1 having the highest value) were those structures:

1. That would have the least amount of transactions/flow problems;
2. That will tend to increase morale and decrease turnover;
3. Most conducive to an on-line (high technology) environment;
4. That provide for a gestalt or a greater awareness of the totality of activities to get an employee paid;
5. Which provide for more equitable workloads;
6. That promote increased information exchange and communication.

The constraints considered were:

1. Legal;
2. Administrative;
3. Physical/Technological;
4. Financial;
5. Political;
6. Distributional ("win/loose").

As seen in Figure IV, Appendix, and keeping in mind our discussion of the Orthodox vs. Unorthodox Models for organization, it can be seen that the

present structure of Payroll/Operations is departmentalized by function (rather than flow of work). We have Operations providing basically position control-hourly, and credentials (non-unique). Opposite, we have Payroll providing basically warrants and wage/salary adjustments (not to be confused with the assigning of wage/salary). Thus, the two functions are "Operations" and "Payroll," each separate and unto themselves.

The problems inherent in this type of structure were discussed previously. There are other problem areas not yet mentioned. If, for example, Operations is busy, and Payroll is slow, an employee from Payroll cannot float over to assist Operations. Moreover, this "see-saw" effect tends to be created in the first place by having departmentation based on function. Also, note in Operations that since the recent elimination of a CETA Clerical Assistant III, the workload distribution of H - O is now split between the two Clerical Assistants III. Furthermore, the distribution categories in Operations, A - G, H - O, and P - Z, do not correspond to Payroll's distribution categories of A - F, G - M, and N - Z. This too would appear to be confusing in that, for example, one Operations CA III, A - G, has to correspond to two Payroll Clerks, A - F, and G - M.

Position control, in relation to the present structure, is another area of concern, especially as to bottlenecks in transaction flow. For new contract positions or vacant contract positions, position control-contract is assumed by the Director's secretary. However, if the vacancy or new-hire is hourly, position control-hourly is assumed by Operations.

Finally, there is the expressed concern of Payroll/Operations of the splitting of benefits activities. In the Benefits Office proper, the counseling of the contract employee as to PERS/STRS; the origination of the PERS/STRS member form (only to be processed by Payroll); health, dental, and vision plans; a long-term disability plan; auto club; and life insurance; are assumed. However, in Payroll itself, the following are assumed: EDD Benefit Audit;

California 672 STRS; California Disability Claim; California Workmen's Compensation; receipt and processing of PERS/STRS contract; and the origination and processing of PERS/STRS hourly, including deductions for both contract and hourly employees; and PERS/STRS refunds.

As noted in the Radical alternative (Figure V, Appendix), most of the benefits-type activities currently under Payroll (excluding the actual deductions) are recommended to be assumed by the Benefits Office. This would, in turn, shift most of the benefits workload from the Payroll area (particularly the Payroll Supervisor) and would allow that area and its supervisor more time for warrants, wage/salary adjustments, and deductions (assuming that such an action would be coupled with a restructuring).

ALTERNATIVE I - RADICAL

This alternative (Figure V, Appendix) assumes that:

1. All of position control (both contract and hourly) is internal to Payroll/Operations and would be overseen by a Position Control Coordinator (see: Table I, DISADVANTAGES - FINANCIAL);
2. Benefits activities are transferred from Payroll to the Benefits Office; e.g., PERS, STRS, Calif. Disability, Calif. Workmen's Compensation, Calif. EDD Benefit Audit, etc., would originate from, and be processed by that office. Payroll (viz., Teams I & II in the alternatives) would merely monitor and actually take out the deductions;
3. There is a restructuring, such that departmentation is based on flow of work; related activities are together whether "like" or "unlike." Thus, Team Section I = 1 Clerical Assistant III and 1 Payroll Clerk, both handling all categories of employees exclusive to A - M. The supervisor of this team is no longer "Operations Supervisor," but is "Team I Supervisor." The same conditions hold

ALTERNATIVE I - RADICAL (continued)

true for Team II, except they assume all categories of employees exclusive to N - Z, and are supervised by "Team II Supervisor," who is currently "Payroll Supervisor";

4. A Resource Team is developed to assist/advise both Teams I and II on unique or special cases. This team is composed of:

   a. Team I Supervisor - Resource Specialist in Operations;

   b. Team II Supervisor - Resource Specialist in Payroll;

   c. Position Control Coordinator - Resource Specialist in position control-contract (including the Board Docket);

   d. Credentials Technician - Resource Specialist in credentials;

   e. Office Technician I - Resource Specialist in wage/salary.

5. There exists a floating Payroll Clerk who may work with both teams. Thus, if Team I is busy and Team II is slow, the Payroll Clerk can float to Team I's side, and vice versa. Furthermore, a CA III from Team II, for example, could also float to Team I if the work-load was even more burdensome. Ideally, the floating Payroll Clerk would be cross-trained in both Operations and Payroll to help reduce the need to ever float a CA III from one team to another.

ALTERNATIVE II - MODERATE

Alternative II (Figure V, Appendix) is exactly like Alternative I, except the benefits activities currently with Payroll/Operations are not shifted to the Benefits Office.

ALTERNATIVE III - MARGINAL

Alternative III (Figure V, Appendix) is exactly like Alternative II, except position control-contract remains with the Director's secretary (including the Board Docket).

The advantages and disadvantages of each alternative are weighed against the constraints in Tables I, II, and III which follow. As noted earlier, each alternative meets the developed set of criteria and has been ranked accordingly.

TABLE I

ALTERNATIVE I - RADICAL (RANK 1)

ADVANTAGES AND DISADVANTAGES WEIGHED AGAINST CONSTRAINTS

	LEGAL	ADMINISTRATIVE	PHYSICAL/TECHNOLOGICAL	FINANCIAL	POLITICAL	DISTRIBUTIONAL
ADVANTAGES	ED CODE 85266 (Fiscal Accountability); and see: Report on Implementation Plan For Fiscal Accountability For Payroll Warrants, pgs., 1.3, 2.14, 9.0, 9.2, 9.3, 9.4 -Duties still separated -Formally/theoretically lines of authority between supervisors and operatives still clear	See: Office Of The San Diego County Superintendent of Schools: Fiscal Accountability For School Districts Of San Diego County (re: EDUCATION CODE 85266), Appendix, pg. 39, "STAFFING" (third paragraph): -Reduces duplication of effort	TECHNOLOGICAL: More conducive to on-line, high-technology environment. PHYSICAL: All of position control now internal to Payroll/Operations.	Reduce operating costs via: -Decrease in turnover -Increase in worker satisfaction leading to higher productivity (increase output/input ratio) -Decreased duplication of effort -Movement towards economy of scale (decrease longrun ATC) -More conducive to on-line paying for itself	Would settle in-house position control conflict; viz., Business Services wanting position control-contract, Payroll/Operations wanting position control-contract, Director's secretary wanting to retain position control Board Docket - but, wanting to be rid of position control proper (See: Footnote 14 in "Notes" section)	Payroll Supervisor relieved of some of the benefits duties ("win") Workloads more evenly distributed across Payroll and Operations
DISADVANTAGES		As above, Ibid, pg.10, "If fiscal accountability is granted, the Board should adopt a policy requiring the district to document any changes to the implementation plan which occur after the effective date of fiscal accountability." Pg.15, "School Districts: to retain their fiscally accountable status, school districts will: immediately notify the Co. Superintendent of Schools of any management level organization changes since the granting of fiscal accountability."		If Position Control Coordinatorship not assumed by a present incumbent, a new position would have to be developed. (This could possibly be assumed by Office Tech. I, Wage/Salary if Tech. is physically close to Payroll/Operations nucleus).	Possible reclassification problems if floating Pay. Clerk requires cross-training and if some benefits duties assumed by Benefits Office operatives. -"union grievance"	Benefits Office assumes increased workload shifted over from Payroll ("loose")

TABLE II

ALTERNATIVE II - MODERATE (RANK II)

ADVANTAGES AND DISADVANTAGES WEIGHED AGAINST CONSTRAINTS

	LEGAL	ADMINISTRATIVE	PHYSICAL/TECHNOLOGICAL	FINANCIAL	POLITICAL	DISTRIBUTIONAL
ADVANTAGES	AS PER RADICAL ALTERNATIVE	AS PER RADICAL ALTERNATIVE	AS PER RADICAL ALTERNATIVE	AS PER RADICAL ALTERNATIVE, EXCEPT: -Some duplication of effort still realized in terms of no benefits duties being shifted from Payroll to Benefits Office	AS PER RADICAL ALTERNATIVE	AS PER RADICAL ALTERNATIVE, EXCEPT AS NOTED BELOW IN DISTRIBUTIONAL/DISADVANTAGES
DISADVANTAGES	25	AS PER RADICAL ALTERNATIVE		Duplication of benefits duties as noted above, plus... AS PER RADICAL ALTERNATIVE REGARDING POSITION CONTROL	AS PER RADICAL ALTERNATIVE, EXCEPT: -No possible reclassification problem in the way of Benefits Office operatives	Payroll/Operations still must assume present benefits activities 20

TABLE III

ALTERNATIVE III - MARGINAL (RANK 3)

ADVANTAGES AND DISADVANTAGES WEIGHED AGAINST CONSTRAINTS

	LEGAL	ADMINISTRATIVE	PHYSICAL/TECHNOLOGICAL	FINANCIAL	POLITICAL	DISTRIBUTIONAL
ADVANTAGES	AS PER RADICAL ALTERNATIVE	AS PER RADICAL ALTERNATIVE	AS PER RADICAL ALTERNATIVE, EXCEPT AS NOTED BELOW IN PHYSICAL/TECHNOLOGICAL DISADVANTAGES	AS PER MODERATE ALTERNATIVE		AS PER MODERATE ALTERNATIVE
DISADVANTAGES		AS PER RADICAL ALTERNATIVE	PHYSICAL: Position control-contract remains with Director's secretary	AS PER MODERATE ALTERNATIVE, PLUS: -Duplication of effort regarding position control-contract as it is retained with Director's secretary	AS PER RADICAL ALTERNATIVE, PLUS: -In-house position control conflict will more than likely intensify	AS PER MODERATE ALTERNATIVE, PLUS: -Position control-contract (including Board Docket) retained with Director's secretary

RECOMMENDATIONS FOR PROBLEMS OF SITES/TIMEKEEPING LOCATIONS

"Control" seems to be the key concern as to the lack of site cooperation in the way of timeliness and accuracy when processing and forwarding PASS Sheets, time cards, etc., to Payroll/Operations. Not that site personnel are consciously attempting to "outwit" any procedures - rather, it is a lack of awareness that untimeliness and inaccuracy causes negative consequences for Payroll/Operations.

In the past, attempts at control have been made through training sessions and an instructional manual (which subsequently became outdated, thus requiring periodic memos to sites in the way of procedural updates). In the long run, however, none of these methods have worked - the problems still persist.

What is needed then, is to "control" by selective adaptation to human nature. Obviously, Payroll/Operations' expectations of the sites, and vice versa, are mismatched. Intervention between the two areas is necessary - that intervention being an OD approach.

Whatever mode of OD is required (and this is very situational), some basic concerns should be mentioned:

1. What exactly does Payroll/Operations expect from the sites and why aren't these expectations being met?
2. What exactly do the sites expect from Payroll/Operations and why aren't these expectations being met?
3. What problematic means are resulting in problematic ends when Payroll/Operations and the sites interface?
4. What ideal means would lead to ideal ends when Payroll/Operations and the sites interface?

The above concerns and problems should be dealt with through the use of an in-house consultant who would act as a third-party mediator/facilitator.

RECOMMENDATIONS FOR PROBLEMS OF SITES/TIMEKEEPING LOCATIONS (continued)

Thus, rather than "controlling" sites into cooperation, the sources and reasons for the conflict are brought out and managed via site personnel, Payroll/Operations personnel, and the in-house consultant working together in a constructive setting.

MISCELLANEOUS RECOMMENDATIONS

RECOMMENDATIONS: TOP-LEVEL MANAGEMENT

It was noted earlier that there are concerns in Payroll/Operations of not receiving top-level management support (viz., beyond the Director of Personnel Services). This is reportedly exemplified by the monthly ordeal of District employees contacting top-level management because of warrant errors; top-level management then expresses strong concern to the Director of Personnel Services, who in turn expresses the same to the Manager of Payroll/Operations, who follows-up through the supervisors, who in turn follow-up through the operatives. What we end up with is an ongoing percolating effect of conflict - percolated up from those paid, and trickling down to those who do the paying (the operatives). This leads to increased workloads in that adjustments have to be made, which in turn increase the probabilities of more errors. Payroll/Operations feels that if top-level management "forced" sites to follow proper procedures, many of these warrant problems would disappear. "Forcing" or "controlling" sites into adherence of procedures, however, is not feasible as previously mentioned. Moreover, it was hypothesized earlier that hopefully, many of these problems would be ameliorated by opting for one of the three alternatives, coupled with an OD approach to the Payroll/Operations - sites conflict. Thus, given time and proper resources, this percolating effect of conflict would be reduced in intensity.

It follows then, that the course of action for top-level management is evident in the previous recommendations - namely, reorganization of Payroll/Operations and intervention between the latter and the timekeeping locations.

MISCELLANEOUS RECOMMENDATIONS (continued)

RECOMMENDATIONS: ON-LINE TRAINING

This recommendation is straightforward - unless a comprehensive, in-depth training program for on-line is expedited for Payroll/Operations personnel, there will be intense operational problems when on-line is fully implemented. This holds true whether any of the other recommendations are opted for or not. This is not to say that there hasn't been any on-line training. There have been several training sessions by IAI, but these have been either in-depth, isolated sessions with single individuals (mostly supervisors), or basic overview sessions with groups. Furthermore, additional on-line knowledge gained by those few who do have expertise has been gained by them staying past regular work hours and getting "hands-on" experience by working with the terminals.

This haphazard approach to on-line training stems from two reasons:

1. It seems that IAI's teaching method is based on a "hand-me-down" approach where supervisors and managers are given in-depth training which is to be passed down to the operatives;
2. There is simply not enough time for groups to break away from daily operations to attend in-depth training sessions.

With on-line training being by nature highly technological both in concept and practice, it appears that the only way of undertaking in-depth training which encompasses the manager, supervisors, and operatives is through:

1. Either after-hours or weekend seminars utilizing an experiential ("hands-on") approach which covers both theory and practice;
2. The development of a simplified, self-paced, programmed learning manual on on-line theory and practice.

It is recommended that Payroll/Personnel Projects Team members assign the tasks of determining:

1. When the group training seminars can be conducted;

RECOMMENDATIONS: ON-LINE TRAINING (continued)

2. Who has the expertise to conduct them;
3. Who has the expertise to develop a self-paced, programmed learning manual on on-line theory and practice.

RECOMMENDATIONS: FORM CHECK-OFF LIST

Table IV (Appendix) provides a basic check-off list as to what status currently used forms should have when on-line is 100%. The main concern here is: What new forms will have to be designed? What forms will disappear?

It is recommended that the Payroll/Personnel Team members (especially those of Payroll/Operations and Data Processing) consider this need prior to full on-line.

RECOMMENDATIONS: DEVELOPMENT OF A PROCEDURES MANUAL

During the course of the interviews and observations, several Payroll/Operations personnel expressed concern of lacking a procedures manual and thus, not having standardized methods for day-to-day operations.

Presently, this is a mini-conflict in itself in that the Manager feels it should be up to the operatives to produce a manual; on the other hand, the operatives feel this should be a task for the Manager. Furthermore, it is understood that the manual was to have been developed some time ago. Realistically, however, this would have put the "cart before the horse." If the manual (either written by the Manager or the operatives) would have been written, it seems it would subsequently have to be revamped when fully on-line as procedures would inevitably have changed.

Recommendations addressing this problem area are twofold:

1. The writing of a procedures manual to be written:
   a. After all on-line training is completed, and
   b. After any structural changes have been implemented.
2. The writing of the procedures manual should be a joint effort of management and operatives - perhaps through a mini-teams approach.

RECOMMENDATIONS: LOCATIONS OF KEY PERSONNEL AFTER OFFICE RENOVATION

According to Facilities'/Equipment's master locational plan (Figure VI, Appendix), most key locations of Payroll/Operations personnel interface well with the teams-approach concept noted in the three organization structural alternatives.

There are, however, two problems with the master locational plan:

1. The planned location of the Credentials Technician;
2. The planned location of the Office Technician I, Wage/Salary.

(NOTE: In Figure VI, the floor plan itself is to scale, but desk sizes and exact locations of the desks themselves are not to scale. Nonetheless, when actually measured and compared, the planned locations of both the Credentials Technician and the Office Technician I, Wage/Salary [solid line boxes], are several feet further from the Payroll/Operations nucleus than the suggested locations [broken line boxes]).

The rationale behind moving the Credentials Technician and the Office Technician I, Wage/Salary, can be seen in several of the mapped flow charts (e.g., PASS Sheets, batching of trans/input forms, etc.): there is frequent interaction between the latter two areas, and between each of the two areas and the Payroll/Operations nucleus.

Table V below compares approximate footage as based on the master renovation plan vs. the recommended plan for the location of Payroll/Operations, Credentials, and Wage/Salary:

TABLE V

APPROXIMATE DISTANCES BETWEEN PAYROLL/OPERATIONS, CREDENTIALS, AND WAGE/SALARY BY MASTER PLAN AND AS RECOMMENDED

APPROXIMATE DISTANCE FROM:	MASTER PLAN	AS RECOMMENDED	DIFFERENCE
Credentials to Payroll/Oper.	34'	20'	14'
Wage/Salary to Payroll/Oper.	48'	26'	22'
Credentials to Wage/Salary	16'	10'	6'

RECOMMENDATIONS: LOCATIONS OF KEY PERSONNEL AFTER OFFICE RENOVATION (continued)

With frequent interactions among these areas on a daily basis (especially between: Credentials - Wage/Salary, and Credentials - Operations), the footage differences would take their toll in the way of physical exertion; decreased auditory, visual, and oral communication (perhaps leading to tied-up intercom lines); and general worker frustration - all leading to lower productivity.

RECOMMENDATIONS: WHO ENTERS WHAT WHEN 100% ON-LINE?

Beyond the problems discussed throughout this analysis, it was also requested by Payroll/Operations that Research/Planning make suggestions as to who enters what when 100% on-line.

After carefully weighing this request against subsequent information gathered during the course of this study, it was decided that no recommendations can be made regarding this legitimate concern. This position is based upon the following reasons:

1. It is beyond the technical expertise of Research/Planning to make such a recommendation;
2. The technical expertise for such a recommendation is presently available in Data Processing;
3. It is difficult to make such a recommendation in the first place when it has not been determined who exactly will be trained in on-line usage and when the training will begin.

It is suggested, however, that both the Payroll/Personnel Project Team members and operatives together assess this need as a group, and reach a decision as a group.

CONCLUSION

CONCLUSION

Suffice it to say, the three alternatives, each of which may serve as a basis for organizational change, were not arbitrarily selected at random (i.e., "shots in the dark" to problem solving). Each alternative is a form of the Unorthodox Model noted earlier, and each was critically judged against preset criteria and constraints. Furthermore, each of the alternatives are modified forms of an Ideal Construct (Figure VII, Appendix).

The problems inherent in the Ideal Construct itself are not in that it does not meet the present criteria (in fact, it surpasses the three alternatives in meeting the criteria), rather, it does not meet the preset legal and administrative constraints. Specifically, these constraints are cited in:

1. Report On Implementation Plan For Fiscal Accountability For Payroll Warrants, January 29, 1979, San Diego Community College District;
2. Fiscal Accountability For School Districts Of San Diego County, September, 1978, Office of the San Diego County Superintendent of Schools;

both of which address specific regulations and guidelines pursuant to EDUCATION CODE 85266, for Community College Districts (for detailed coverage, please refer to both of these references, available in Business Services and Research/Planning).

In the former, specific examples of legal/administrative constraints include:

1. Page 1.3, Section 1B (regarding responsibilities and independence of the Disbursing Officer):
   - Sentence number 12: "To ensure that the separation of duties is properly controlled";
2. Page 9.0, Section 9 (regarding staffing duties and responsibilities):
   - First and second paragraphs, clearly showing that the Payroll Supervisor's and Payroll operatives' duties are to be separate and different from those of the Operations Supervisor's and Operations operatives' duties;

CONCLUSION (continued)

3. Page 9.2, Section 9 (duties and responsibilities, continued):
   - (Referring to procedure 5a, page 5.1): "The Payroll Supervisor will supervise the actual procedures performed by a Payroll Clerk";
   - (Referring to procedure 5b, page 5.2): same as above in number 3;
4. Page 9.3, Section 9 (referring to procedures 7f, page 7.16; and 7h 1a, page 7.22; and 7h 1b, page 7.27); a basic rehash of required differing duties between Operations and Payroll;
5. Page 9.5, Section 9, Exhibits 9e, 9f, 9g, 9h, 9i; giving job descriptions which again indicate the differences in duties of Payroll vis a vis Operations.

In the latter (County Manual), specific examples include:

1. Page 12, last paragraph, section on "Organization";
2. Page 17, point number 9: again, references to the separation of duties;
3. Page 45, item number 10: references to the separation of duties.

These guidelines generally concern the separation of the duties of the respective supervisor and operatives of Payroll and Operations and partially formed the audit check-list of Deloitte, Haskins, and Sells (when SDCCD was applying for fiscal accountability).

Referring to Figure VII, Appendix, it can be seen that in the Ideal Construct, duties are clearly not separated. Each operative controls the total activities required, from inputing an employee into the system, to actually assuming warrants and wage/salary adjustments.

The obvious legal/accounting rationale behind our present structure leading to rigid separation of duties which precludes the Ideal Construct as a viable alternative is based on the bureaucratic assumptions that people "have inherent mental, moral, and physical weaknesses, that the threat of prompt exposure will deter an individual from committing fraud, and that an individual who is inde-

pendent will recognize and report irregularities (15)." However, no matter how Payroll/Operations is organized, whether on-line or not on-line, fraud can be committed if the employee is willing to take the risks and face the consequences.

In closing, the analysis should have made clear six pertinent ideas:

1. Operational problems largely stemming from poor organizational structuring have intensified since the District has become fiscally accountable;
2. These problems, unless attended to, will be magnified even more when on-line is 100%;
3. Ideally, the Ideal Construct model of organization would be an alternative - however, legal/administrative constraints preclude this, therefore;
4. It is hoped that one of the modified forms of the Ideal Construct (Radical, Moderate, or Marginal alternative) will be opted for (16);
5. That any one of the alternative structures would have much greater ability to covary with an on-line, high-volume, high-technology environment;
6. That implemented changes or recommendations regarding either the restructuring of Payroll/Operations or the Payroll/Operations-Sites/conflict should be followed up with an OD approach to maintain any momentums of change.

These changes will require a radical departure from the present managerial philosophy and practices of Payroll/Operations as effective change requires the restructuring of supervision. Moreover, management should not view the proposed changes as insurmountable tasks, rather, they should be viewed as attainable objectives that, when met, can bring a new lifeblood into the organization's culture.

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CODES AND ABBREVIATIONS USED IN FLOW CHARTS AND ORGANIZATION CHARTS

a	PER ALPHABETICAL ORDER
a ω	FROM BEGINNING TO END
$\overline{C}$	WITH
$\overline{S}$	WITHOUT
$\overline{P}$	AFTER
Δ	TO CHANGE, CHANGE TO, CHANGED FROM
H, HR, HRLY	HOURLY
CA III	CLERICAL ASSISTANT III
CERT.	CERTIFICATED
CLASS.	CLASSIFIED
CLASS. SEC.	CLASSIFICATION SECRETARY
CRED. TECH.	CREDENTIALS TECHNICIAN
DP	DATA PROCESSING
DIRECS SEC.	PERSONNEL DIRECTOR'S SECRETARY
KEY	KEYPUNCH
MNGRS SEC.	PAYROLL/OPERATIONS MANAGER'S SECRETARY
OPRNS OPERATIVES	OPERATIONS OPERATIVES
OPRNS SEC.	OPERATIONS SECRETARY
OPRNS SUP.	OPERATIONS SUPERVISOR
PAYROLL MNGR.	PAYROLL/OPERATIONS MANAGER
PC	POSITION CONTROL
PAYCLERK	PAYROLL CLERK
PAYROLL SUP.	PAYROLL SUPERVISOR
PAYROLL SEC.	PAYROLL SECRETARY
W/S	WAGE & SALARY

FIGURE IV

PRESENT STRUCTURE

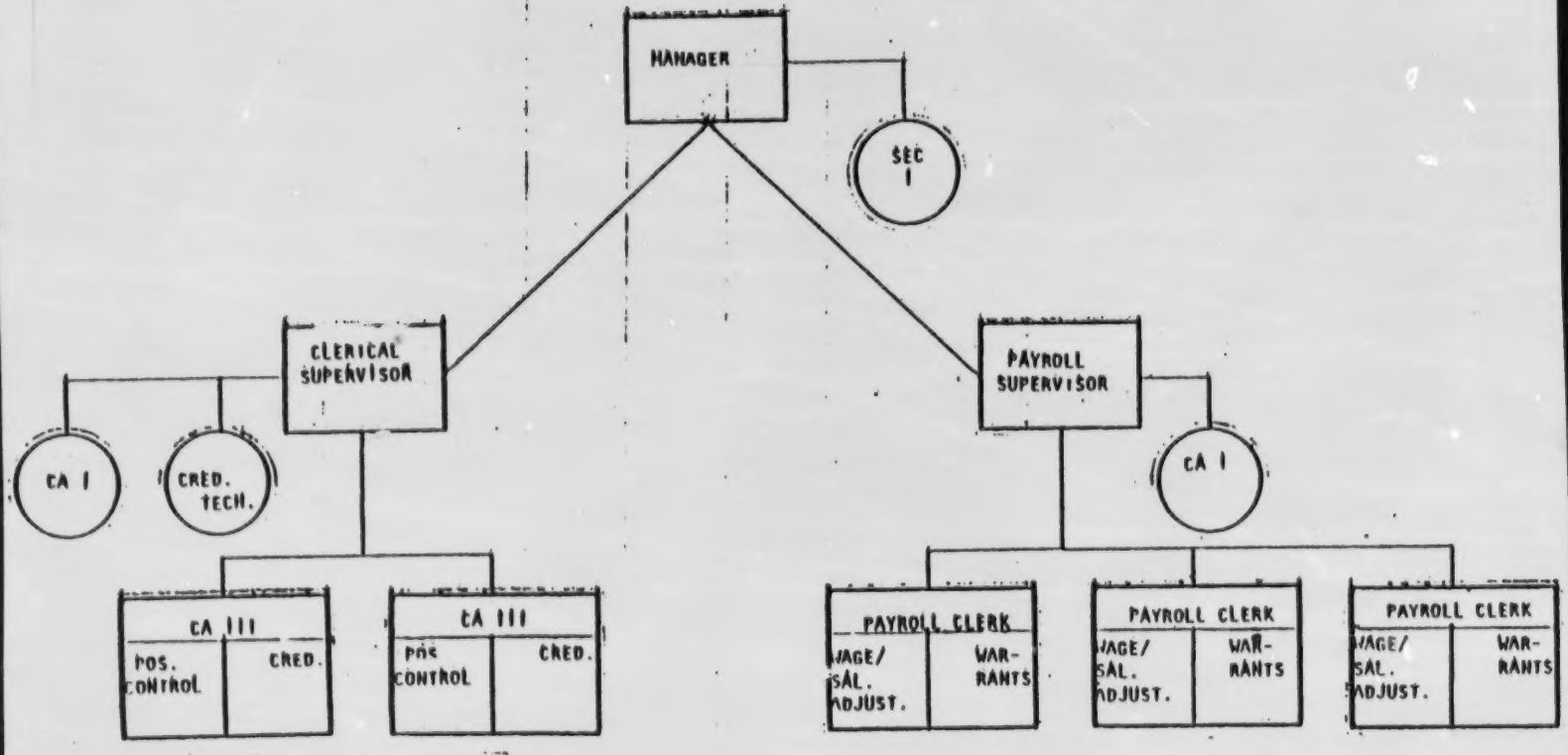
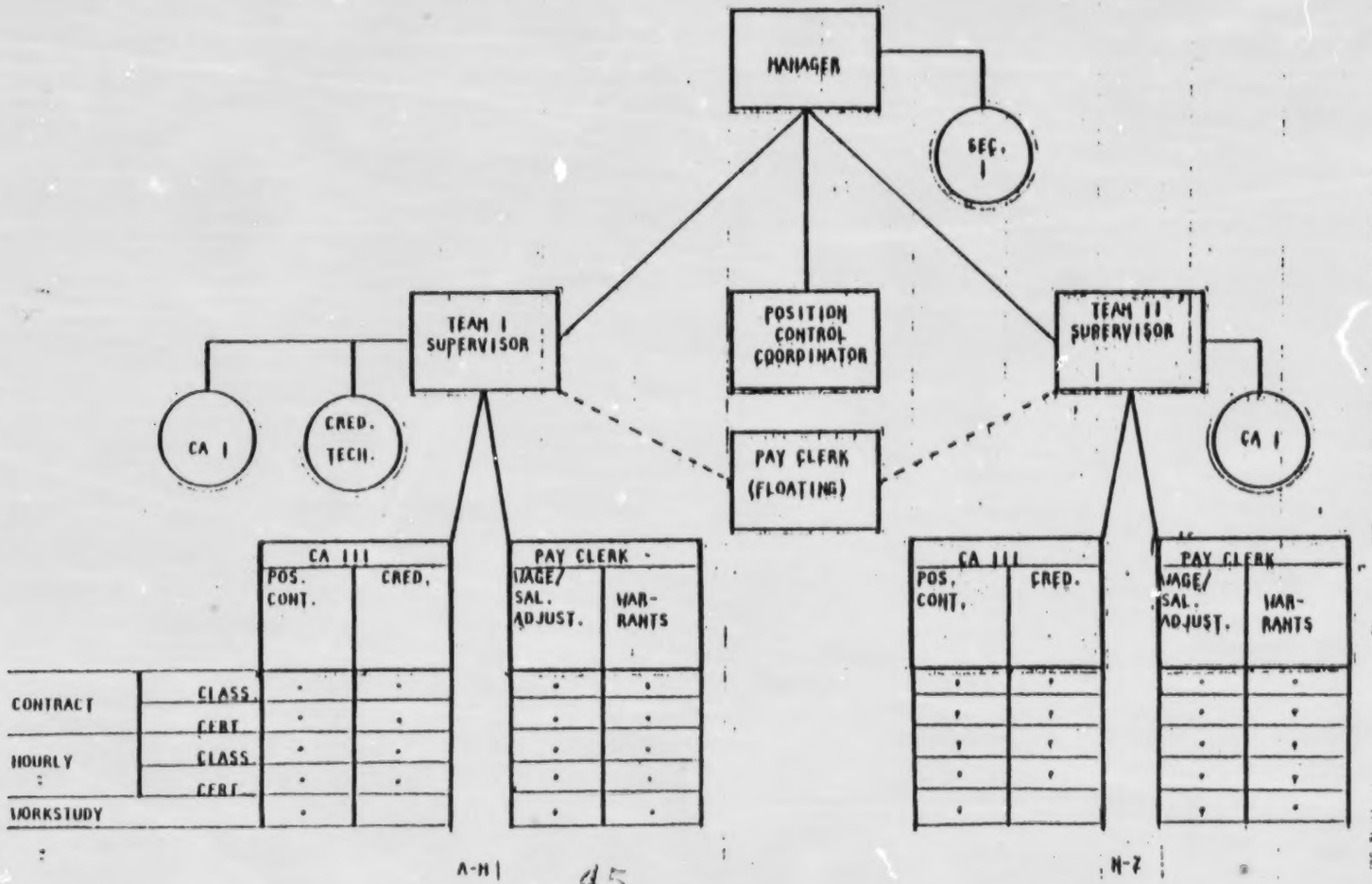


FIGURE V

THREE PROPOSED STRUCTURES



	RADICAL	MODERATE	MARGINAL
RESOURCE TEAM	CRED. TECH FOR CREDENTIALS; TEAM I SUP. FOR OPERATIONS; TEAM II SUP. FOR PAYROLL; OFFICE TECH. I FOR WAGE/SALARY; POSITION CONTROL COORDINATOR FOR POSITION CONTROL (INCLUDING BOARD DOCKET & CONTRACT PERSONNEL)	SAME AS RADICAL	SAME AS RADICAL, EXCEPT: NO POSITION CONTROL COORDINATOR; THIS REMAINS WITH DIRECTOR'S SECRETARY; ONLY POSITION CONTROL FOR HOURLYS INTERNAL TO PAYROLL/ OPERATIONS
OPERATIVE RESTRICTIVE	TEAM I ASSUMES ALL NECESSARY ACTIVITIES FROM BEGINNING TO END FOR A-M; TEAM II SAME, N-Z. THIS ALLOWS FOR TOTAL GESTALT FOR ALL PERSONNEL ASSIGNED TO EACH TEAM FOR ALL ACTIVITIES	SAME AS RADICAL	SAME AS RADICAL
POSITION CONTROL	POSITION CONTROL FOR CONTRACT NOW INTERNAL TO P/O & UNDER AUSPICES OF POSITION CONTROL COORDINATOR. PC COORD. ASSUMES PC FOR CONTRACT PERSONNEL, OVERSEES TEAM OPERATIVES ASSUMPTION OF PC FOR HOURLY	SAME AS RADICAL	POSITION CONTROL FOR CONTRACT PERSONNEL REMAINS WITH DIRECTOR'S SECRETARY. POSITION CONTROL FOR HOURLY REMAINS WITH EACH TEAM PER ALPHA DISTRIBUTION
BENEFITS	BENEFITS ACTIVITIES TRANSFERRED TO BENEFITS OFF.: EDD AUDIT, PERS/ STRS MEMBERSHIP, DISABILITY, WORKMEN'S COMP., CA 672, PERS/STRS REFUND. TEAMS II SUP. CONTINUES TO TAKE ACTUAL DEDUCTIONS	ALL BENEFITS ACTIVITIES REMAIN "AS IS" UNDER PRESENT P/O STRUCTURE (VIZ., STILL REMAINS A PRIMARY FUNCTION OF PAYROLL SUPERVISOR (TEAM II SUPERVISOR))	SAME AS MODERATE

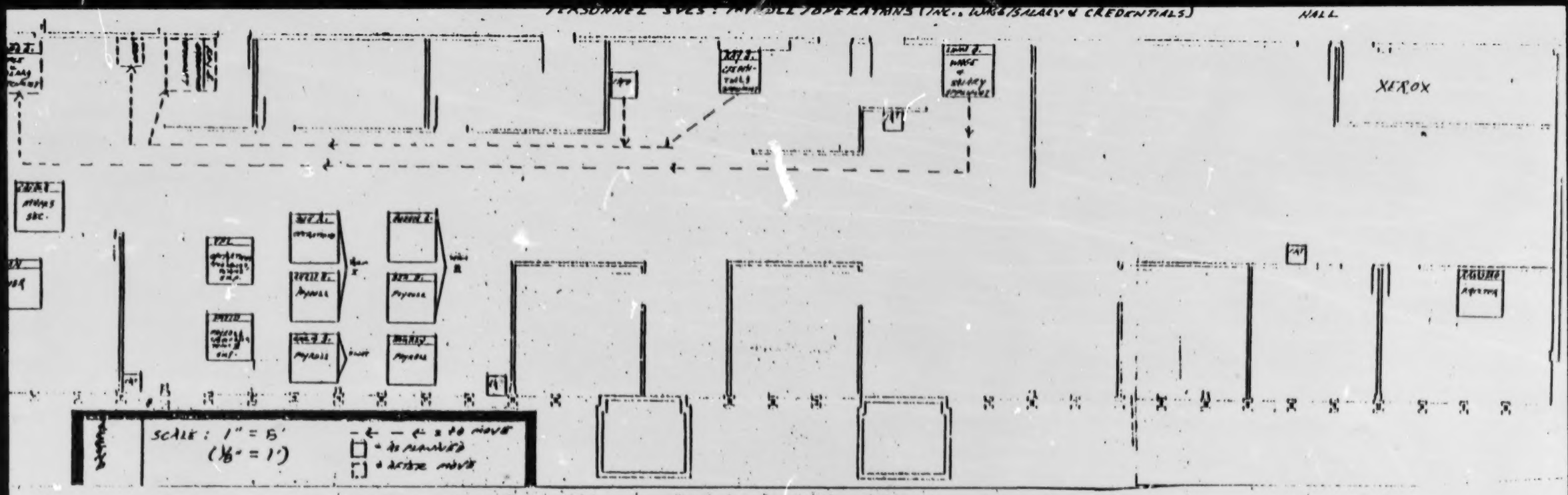


FIGURE VI

LOCATIONS OF KEY PERSONNEL BY MASTER PLAN AND AS RECOMMENDED AFTER OFFICE RENOVATION.

FIGURE VII

IDEAL CONSTRUCT

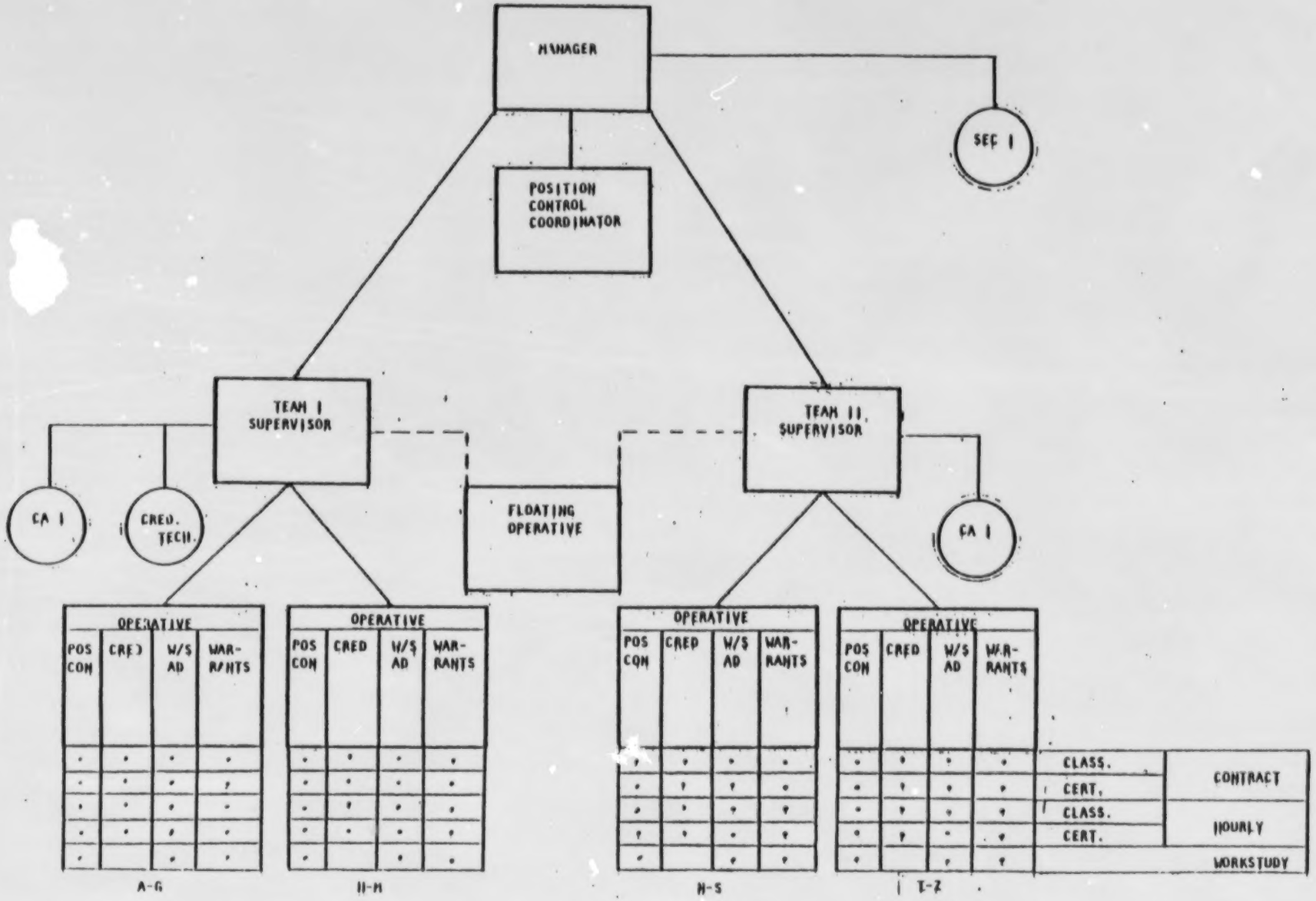


TABLE IV

PRESENT FORM STATUS AND STATUS WHEN ON-LINE: CHECK-OFF LIST (N = 69 Forms)

PRESENT STATUS						PROPOSED STATUS WHEN ON-LINE					
INTERNAL, NON-INPUT	INTERNAL, DIRECT INPUT	STATE/FED, NON-INPUT	STATE/FED, DIRECT INPUT	TIME INPUT (DIRECT)	TRANS FORMS (DIRECT)	INTERNAL, NON-INPUT	INTERNAL, DIRECT INPUT	STATE/FED, DIRECT INPUT	STATE/FED, DIRECT INPUT	TIME INPUT (DIRECT)	TRANS FORM (DIRECT)
Applications (2)	PASS Sheet	Ca. EDD Benefit Audit	W-4	T1	AA/AC						
Beneficiary of Warrants	TB	Ca. Disabil. Claim		T2 adjust	JM						
Support Letter	Change of Address/Name	Ca. Workmen's Comp.		T2 Cert	50 Trans						
Cert/Class Retire Info. (2)	Instructional Availability Form	Ca. 672 STRS		T2 Class	60 Trans						
Cmp. Requirements list, Cert/Class (2)		Fingerprint		T3	70 Trans						
Leave Info. Form		PERS Benef.		T4	CC Trans						
Path		PERS Member			DD Trans						
NPA		PERS Refund			ET						
PERS/STRS ards (2)		STRS Benef.			AG Short						
Physician's Approval		STRS Member			AT Short						
Leave Requests (2)		STRS Refund			T12						
Resign/Retire Notice		STRS Change in Benef.			T13						
Warrant Hld		PERS Change in Benef.			T14 Long						
					T14 Short						
					T11 Long						
					T11 Retire.						
					T11 Short						
					T98						
					T99						
					T16						
					T17						
					T02						
					T03						
					T04						
					T09						
					HV						

FIGURE VIII.1

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERNATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE PART ONE: TRANS FLOWS

Flow per alternative / FORM	RADICAL	MODERATE	MARGINAL
T1, T2, T3, T4 Figure X.1 Appendix	Sites to Teams I/II per alpha distribution whether handprinted or computer printed. Payroll incorporates Operations' activities and vice versa. Viz., both teams will do time inputs, AA/ACs, 998s, verification of T2s against PASS Sheets and/or Employee Assignment List. Unique/special cases referred to Team I and Team II Supervisors according to their specialties on Resource Team	SAME AS RADICAL	SAME AS RADICAL
AA/AC Figure X.2 Appendix	Both Teams I/II assume AA/AC per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
AG/AT Short Figure X.3 Appendix	Both Teams I/II assume AG/AT short per alpha distribution. Wage/Salary Tech.'s flow is batched per alpha distribution per Teams I/II	SAME AS RADICAL	SAME AS RADICAL
T12, T13 Figure X.4 Appendix	Both Teams I/II assume per alpha distribution. Wage/Salary Tech.'s flow is batched per alpha distribution per Teams I/II	SAME AS RADICAL	SAME AS RADICAL
T14 long & T14 short Figure X.5 Appendix	Both T14s assumed by both Teams I/II per alpha distribution. Wage/Salary Tech.'s flow is batched per alpha distribution of Teams I/II	SAME AS RADICAL	SAME AS RADICAL
T11s:Long, short, retirement Figure X.6 Appendix	All T11s assumed by both Teams I/II per alpha distribution. Payroll Manager's secretary's flow remains as is	SAME AS RADICAL	SAME AS RADICAL

FIGURE VIII.2

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERNATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE TRANS FLOW CONTINUED

Flow per alternative / FORM	RADICAL	MODERATE	MARGINAL
T99 & T98 Figure X.7 Appendix	T99s and T98s assumed by both Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
T16 & T17 Figure X.8 Appendix	T16s and T17s assumed by Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
ET (Employee Terminate) Figure X.9 Appendix	ETs assumed by both Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
DD (Delete Trans) Figure X.10 Appendix	DDs assumed by both Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
CC Figure X.11 Appendix	CCs assumed by Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
50 Trans, 60 Trans, 70 Trans Figure X.12 Appendix	50, 60, and 70 Trans assumed by Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL
HV (Void Check) Figure X.13 Appendix	HVs assumed by Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL

FIGURE VIII.3

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERNATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE TRANS FLOWS CONTINUED

Flow per alternative / FORM	RADICAL	MODERATE	MARGINAL
JM (Job Master) Figure X.14 Appendix	Personnel services to Team I Supervisor who serves as Operations Specialist on Resource Team	SAME AS RADICAL	SAME AS RADICAL

57

58

FIGURE IX.1

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERNATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE PART TWO: NON-TRANS FLOWS

Flow per alternative / FORM	RADICAL	MODERATE	MARGINAL
PERS/STRS cards, PERS/STRS Beneficiary, Change in Beneficiary, PERS/STRS Refund, Certificated/Classified Retirement Info. Figure XI.1 - Appendix	PERS/STRS card flow incorporated by Benefits Office. All PERS/STRS member forms originate with and processed by Benefits Office and follow flow as shown with present Payroll section. PER/STRS Refund flow incorporated by Benefits Office. Rather than Operations (present structure) verifying and inputing employees into PERS/STRS (via Classified/Certificated Retirement Info. form), function is assumed by both Teams I/II per alpha distribution. PERS/STRS Beneficiary and Change In Beneficiary flow also incorporated by Benefits Office	Same as present flow, except PERS/STRS cards, beneficiary forms, refund forms, membership form (hourly), and certificated/classified retirement info. forms and their respective flows assumed by Teams I/II per alpha distribution, vis a vis present structure of Payroll responsible for PERS/STRS cards, beneficiary forms (hourly), PERS/STRS membership forms (hourly), PERS/STRS refund form; and vis a vis present structure of Operations responsible for verification/inputing employees into PERS/STRS	SAME AS MODERATE
Calif. 672 STRS, Calif. Disability, Calif. Workmen's Comp., Calif. EDD Benefit Audit Figure XI.2 Appendix	Benefits Office incorporates total flow/activites for all forms	As per flow chart; Payroll Supervisor designated as Resource Team Specialist/Payroll	SAME AS MODERATE

FIGURE IX.2

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERNATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE NON-TRANS FLOW CONTINUED

Flow per alternative / FORMS	RADICAL	MODERATE	MARGINAL
PASS Sheets Figure XI.3 Appendix	From sites to Team I Supervisor (Resource Team Specialist/Operations) for sorting. If for payroll adjustment only, flow to Teams I/II per alpha distribution. If NEW CLASSIFIED HOURLY, directly to Teams I/II per alpha distribution. For NOT NEW CERTIFICATED and NOT NEW CLASSIFIED HOURLY, flow to Credentials Tech. (Resource Team Specialist/Credentials), then to Wage/Salary Tech. (Resource Team Specialist/Wage/Salary), then to Teams I/II per alpha distribution. If NOT NEW MONTHLY CERTIFICATED, flow to Credentials Tech., then to Wage/Salary Tech., then to Teams I/II per alpha distribution; if NOT NEW MONTHLY CLASSIFIED, flow to Wage/Salary Tech., then to Teams I/II per alpha distribution. If NEW MONTHLY, Team I Supervisor sorts to Classification Secretary (Personnel Svcs.) to review for AA/EEOC x 24 hours - then, if NEW CLASSIFIED MONTHLY, to Position Control Coordinator, to Wage/Salary Tech., then to Teams I/II per alpha distribution. If NEW CERTIFICATED MONTHLY, from Classification Secretary to Position Control Coordinator, to Credentials Tech., to Wage/Salary Tech., to Teams I/II per alpha distribution.	SAME AS RADICAL	SAME AS RADICAL, EXCEPT: Position Control -contract is not internal to Payroll/ Operations (remains with Director's secretary)
Warrant Hold Figure XI.4 Appendix	If Warrant Hold initiated by Director's Clerical Assistant: from Clerical Assistant to Teams I/II per alpha distribution; balance of flow per chart. If initiated by Teams I/II, flows to Manager's secretary. If Warrant Hold initiated by Credentials Tech., flow to Teams I/II per alpha distribution.	SAME AS RADICAL	SAME AS RADICAL
Change of Address/Name Figure XI.5 Appendix	Change of Address only: as per present flow chart, except Operations secretary designated as Team I secretary, Payroll secretary designated as Teams II secretary. Change of Name, Zip, or Telephone: from Team II secretary to Teams I/II per alpha distribution.	SAME AS RADICAL	SAME AS RADICAL

FIGURE IX.3

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERNATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE NON-TRANS FLOW CONTINUED

Flow per alternative / ORM	RADICAL	MODERATE	MARGINAL
equest for hort Leave, equest for ong Leave, eave Info. orm, Physi- ian's Approv- l igure XI.6 ppendix	Request for Short Leave: from sites to Manager's secretary for Manager's signiture back to secretary, to Teams I/II per alpha distribution. From either Team to keypunch. Request for Long Leave: from sites to Manager's secretary for Manager's signiture back to secretary, to Team I Supervisor for input to keypunch. Leave Info. form: as per present flow chart. Physician's Approval: as per present flow chart.	SAME AS RADICAL	SAME AS RADICAL
ealth History igure XI.7 ppendix	As per present flow chart	SAME AS RADICAL	SAME AS RADICAL
ingerprint ard igure XI.8 ppendix	As per present flow chart	SAME AS RADICAL	SAME AS RADICAL
PA igure XI.9 ppendix	From sites to Teams I/II via PASS Sheets per alpha distribution. PASS Sheet as direct input - NPA flagged. NPA Board List: one copy to Team I Supervisor to serve as centralized copy for Teams I/II; one copy to Position Control Coordinator for Board approval. Approved NPAs to Teams I/II per alpha distribution; disapproved NPAs to Teams I/II per alpha distribution.	SAME AS RADICAL	SAME AS RADICAL, EXCEPT: Copy of NPA Board list to Director's secretary
pplications blue/yellow), B, Oath, Bene- iciary of War- ants igure XI.10 ppendix	All YELLOW APPS., hourlys: as per present flow chart up to, and through Credentials Tech. From Credentials Tech. to Wage/Salary Tech., to Teams I/II per alpha distribution. YELLOW APPS., monthlys: from Credentials Tech. to Position Control Coordinator, then back to Credentials Tech.; balance of flow to Wage/Salary Tech., then to Teams I/II per alpha distribution. BLUE APPS., hourlys: from check-in with Director's Clerical Asst. (excluding receipt of PASS Sheets) to Teams I/II per alpha distribution. BLUE APPS., monthlys: from Position Control Coordinator to Wage/Salary Tech. to Teams I/II per alpha distribution.	SAME AS RADICAL	SAME AS RADICAL, EXCEPT: Position Control-Contract remains with Director's secretary

FIGURE IX.4

FLOW CHANGES FROM PRESENT STRUCTURE TO ALTERJATIVE STRUCTURES LEADING TO BEST-FIT FLOW BY ALTERNATIVE NON TRANS FLOW CONTINUED

Flow per alternative / FORMS	RADICAL	MODERATE	MARGINAL
W-4 Figure XI.11 Appendix	From Wage/Salary Tech. to Teams I/II per alpha distribution. If only to change tax status, from Payroll Secretary to Teams I/II per alpha distribution	SAME AS RADICAL	SAME AS RADICAL

THIS SECTION OF THE APPENDIX HAS BEEN DELETED DUE TO THE IRREPRODUCIBILITY OF THE HOLOGRAPHIC FLOW CHARTS LISTED BELOW.

- FIGURES X.1 - X.14: FLOW CHARTS OF TRANS FORM
  - FIGURE X.1: T1, T2, T3, T3 40
  - FIGURE X.2: AA/AC 41
  - FIGURE X.3: AG Short/AT Short 42
  - FIGURE X.4: T12, T13 43
  - FIGURE X.5: T14 Long, T14 Short 44
  - FIGURE X.6: T11 Long, T11 Short, T11 Retirement 45
  - FIGURE X.7: T98, T99 46
  - FIGURE X.8: T16, T17 47
  - FIGURE X.9: ET 48
  - FIGURE X.10: DD 49
  - FIGURE X.11: CC 50
  - FIGURE X.12: 50 Trans, 60 Trans, 70 Trans 51
  - FIGURE X.13: HV 52
  - FIGURE X.14: JM 53
- FIGURES XI.1 - XI.11: FLOW CHARTS OF NON-TRANS FORMS
  - FIGURE XI.1: PERS/STRS Cards, PERS/STRS Member Applications, PERS/STRS Refund, Classified/Certificated Retirement Information 54
  - FIGURE XI.2: Ca. 672 STRS, Ca. Disability Claim, Ca. Workmen's Compensation, Ca. EDD Benefit Audit 55
  - FIGURE XI.3: PASS Sheets 56
  - FIGURE XI.4: Warrant Hold 57
  - FIGURE XI.5: Change of Address/Name 58
  - FIGURE XI.6: Request for Short Leave, Request for Long Leave, Physician's Approval, Leave Information Form 59
  - FIGURE XI.7: Health History 60
  - FIGURE XI.8: Fingerprint Card 61
  - FIGURE XI.9: NPA 62
  - FIGURE XI.10: Applications, TB, Oath, Beneficiary of

FIGURE XII.1

LABOR DISTRIBUTION FLOW CHART

LABOR DISTRIBUTION FEEDS PAYROLL INFORMATION TO THE ACCOUNTING SYSTEM, GIVING ACTUAL LABOR AND BENEFIT COSTS AND TAX, DEDUCTION, BENEFIT LIABILITIES.

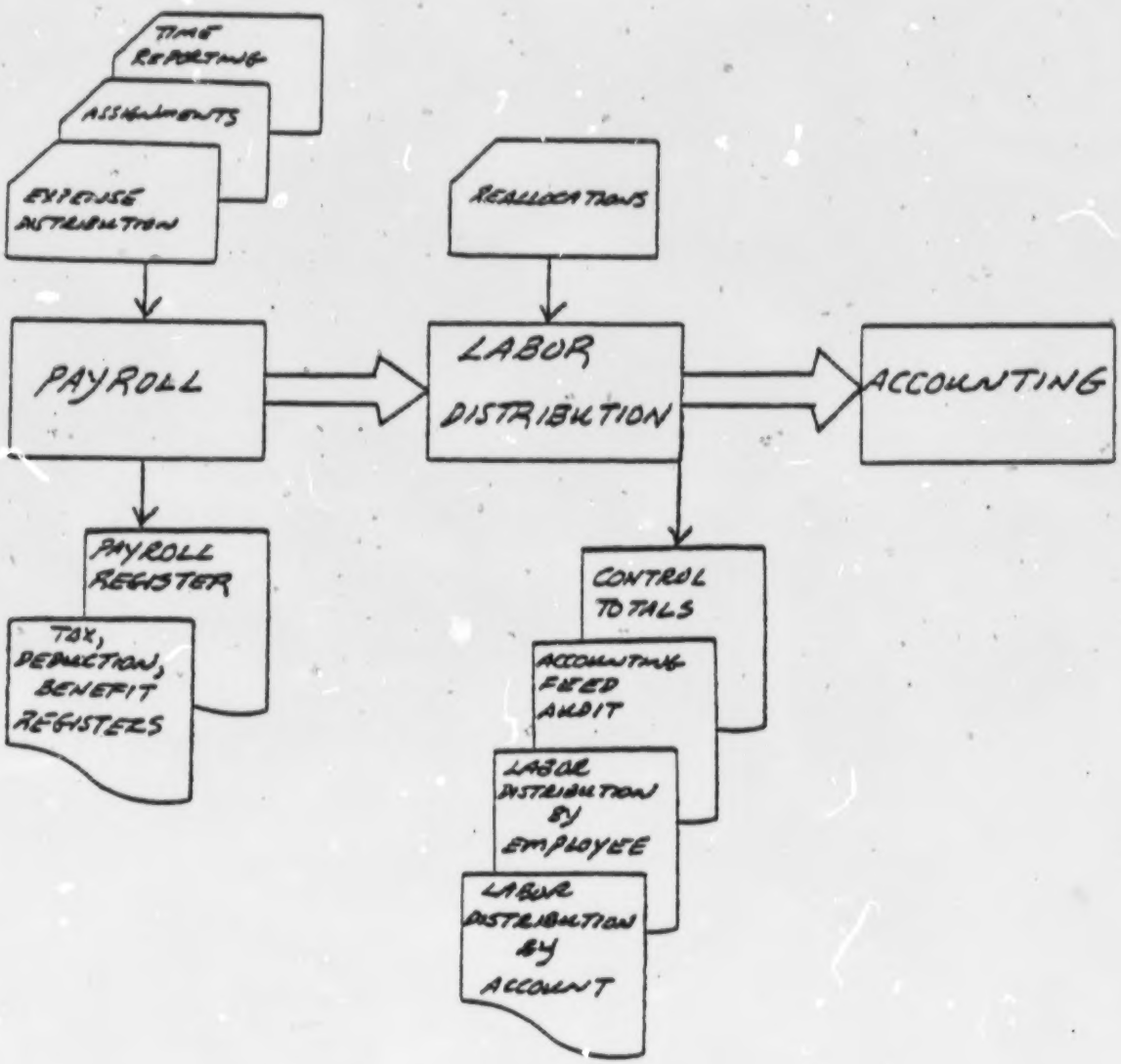


FIGURE XII 2

EXAMPLE OF PAYROLL FEED TO LABOR DISTRIBUTION

ASSIGNMENTS:

ASSGN JOB/ID	START DATE	END DATE	POSITION #	F.T.E.	PAY RATE	EARN CODE	ASSGN LABOR OBJ
A-004(CCCI)	7/1	6/30	000044	1.0	$1200(P)	011	1111
A-008(CCCI)	7/1	6/30	000046	0.0	$3600(A)	090	1113

CURRENT PERIOD EARNINGS:

EARN CODE	DESCRIPTION	CURRENT $
011	MONTHLY CLASSROOM PAY	1200
090	SPECIAL COMPENSATION (DEPT. CHAIR)	300

EXPENSE DISTRIBUTION:

JOB/CODE	ACCOUNT #	POSITION #	DIST.%	START DATE	END DATE	EARN CODE
A-001	2BA-AA-1900-0000	000044	60	7/1	6/30	-
A-002	2BA-AA-1905-0000	000044	40	7/1	6/30	-
A-003	2BA-AA-1905-0000	000046	100	7/1	6/30	-

FIGURE XII.3

GROSS PAY	$1500.00
TAXES	
020-FEDERAL	195.00
030-CALIFORNIA	41.17
DEDUCTIONS	
015-STRS	120.00
415-CREDIT UNION	50.00
930-CCSA	2.00

NET PAY = 1091.83

BENEFITS	
020-KAISER	76.00
530-STRS	120.00

DISTRIBUTION:

ACCOUNT	LABOR	BENEFITS:	(STRS)	(KAISER)
2BA-AA-1900-1111	$720	48%	57.60	36.48
2BA-AA-1905-1111	480	32%	38.40	24.32
2BA-AA-1905-1113	300	20%	24.00	15.20
			120.00	76.00

"T" ACCOUNT SCHEMATIC OF LABOR DISTRIBUTION FEED
TO THE FINANCIAL ACCOUNTING SYSTEM

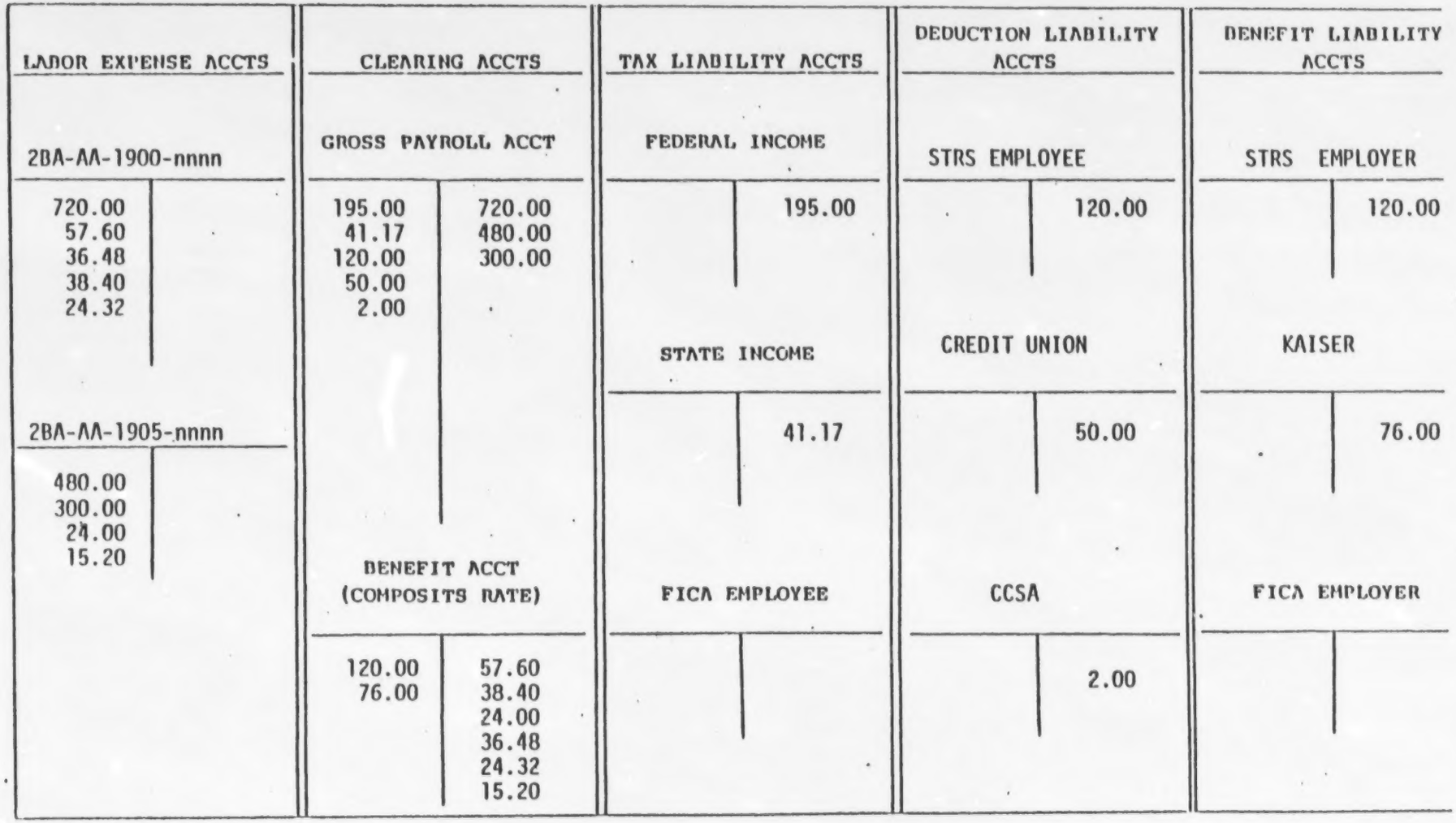


FIGURE XII.4

TABLES VI.1 AND VI.2

SURVEY RESPONSES

SECTION ONE

RESPONSES TO: "PLEASE LIST THE TOP THREE (3) PROBLEMS THAT AFFECT YOUR AREA."

NUMBER OF EMPLOYEES WHO COMPLETED SECTION ONE = 14
TOTAL NUMBER OF RESPONSES: N=36

TABLE VI.1

RESPONSE CATEGORIES, FREQUENCIES, AND THEIR PERCENTAGE OF N

CATEGORIES 1/	f	AS A PERCENTAGE OF N (ROUNDED)
1. Lack of in-house communication/information	7	19
2. Sites/Timekeeping location lacking training cooperation	5	14
3. Too many unnecessary interruptions	5	14
4. Lack of in-house procedures	5	14
5. Immediate need for on-line direct update/ inquiry	3	8
6. Excess workloads	3	8
7. Inaccurate/troublesome record keeping systems	3	8
8. Lack of in-house training	2	6
9. Inadequate work space	1	3
10. Management as reactionary	1	3
11. Lack of coordination with Data Processing leading to imbalances in workflow when producing a payroll (viz., unneeded dead time, followed by a sudden rush to produce a payroll)	1	3
	N = 36	100%

1/ These categories are not to be viewed as isolated responses as they all were recurring themes noted throughout the observations, interviews, and mapping of flows.

SECTION TWO

THE FOLLOWING RANKINGS INDICATE THOSE FULL-TIME PERSONNEL WHO ARE SOUGHT (ON AN AVERAGE BASIS) THE MOST BY ALL CO-WORKERS (WHERE N = 14) THROUGH THOSE WHO ARE SOUGHT THE LEAST, TO EITHER GIVE INFORMATION TO OR RECEIVE INFORMATION FROM.

NUMBER OF EMPLOYEES WHO COMPLETED SECTION TWO = 14
TOTAL NUMBER OF RESPONSES = 14 MATRICES

TABLE VI.2

WORK SOCIOMATRIX RANKINGS OF FULL-TIME PERSONNEL BY TITLE AND PROPER NAME

FULL-TIME PERSONNEL	TITLE	RANK
VAL AMARILLAS	OPERATIONS SUPERVISOR	1
DAVID SLOOP	PAYROLL SUPERVISOR	2
SUE ROCCHIO	OPERATIONS, CA III	3
CHRIS BOGGS	PAYROLL CLERK	3 (TIE ABOVE)
BOBBI CURRIE	OPERATIONS, CA III	4
CHRIS STRIEBICH	PAYROLL CLERK	5
CINDY THOMPSON	PAYROLL SECRETARY	6
BEA DELAROSSA	PAYROLL CLERK	7
LINDA OLIVER	OFFICE TECH., WAGE/SALARY	8
KAY BRUNS	CREDENTIALS TECHNICIAN	9
JOAN JACOBS	PAYROLL/OPRNS MANAGER	10
CAROLE NUNKE	MANAGER'S SECRETARY	11
RUTH ADAMS	OPERATIONS SECRETARY	12

NOTES

1. Report To The Chancellor On Payroll/Personnel Project, July 14, 1978, Payroll/Personnel Project Team, pg. 1.1
2. Ibid
3. Ibid
4. Report On Implementation Plan For Fiscal Accountability For Payroll Warrants, January 29, 1979, Business Services, pg. ii
5. Ibid
6. Ibid
7. Organization Behavior/Development (OD) is an effort of long-range organization problem solving through more effective and collaborative management of the organization's culture through the assistance of a facilitator, catalyst, or change agent. It relies heavily upon the applied behavioral sciences, and its objectives are typified by:

   a. Building trust among individuals and groups;
   b. Creating open, problem solving climates;
   c. Locating decision-making and problem solving responsibilities as close to the source as possible rather than in a particular role or level of the hierarchy;
   d. Increasing ownership of organizational goals and objectives;
   e. Moving toward increased collaboration between interdependent persons and interdependent groups within the organization;
   f. Creating conditions where conflict is brought out and managed;
   g. Increasing awareness of group processes and its consequences for performance; i.e., helping personnel become more aware of what is happening between and to group members while the group is working on the tasks (e.g., communication, influence, feelings, leadership styles and struggles, relationships between groups, how conflict is managed, etc.).

NOTES (continued)

7. (continued)

The basic technology of OD involves:

a. Team Building - focus is on early identification and solution of the work group's problems;

b. Intergroup Problem Solving - groups are brought together for the purpose of reducing unhealthy competitiveness between the groups or to resolve intergroup conflict over such things as overlapping responsibilities, confused lines of authority, etc.;

c. Confrontation Meeting - a problem solving mechanism when problems are known to exist. An action-research format is used whereby the entire management group is brought together, problems are shared, priorities are established, and commitments to action are made;

d. Goal Setting and Planning - supervisor-subordinate pairs and teams engage in performance improvement and target-setting with mutual commitment and review;

e. Third Party Facilitator - involves the use of a skilled third party to help in the diagnosis, understanding, and resolution of difficult problems;

f. Consulting Pairs - is the idea wherein a manager can benefit from a close and continuing relationship with someone outside of his/her organization (in-house or external consultant) with whom he/she can share problems early.

(Condensed from: John J. Sherwood, "An Introduction to Organizational Development", Krannert Graduate School of Industrial Administration, Purdu University, Lafayette, Indiana).

8. Golembiewski, Robert T., "Organization Patterns of the Future: What They Mean to Personnel Administration", "Personnel Administration", December, 1969. In Shafritz, Jay M., ed., A New World: Readings on Modern Public Personnel Management, pgs. 218-234 (copyright 1975, International Personnel Management Association, Chicago, Illinois 60637)

9. Ibid

NOTES (continued)

10. For example, see Paul Dickson's, The Future Of The Workplace, (Weybright and Talley, N.Y.), available in the Research/Planning library

11. Golembiewski, pgs. 221 and 224-226

12. As noted in a November 19, 1979 interview with the Operations Supervisor

13. Ibid

14. The position control conflict stems from Business Services wanting position control-contract under their auspices; the same holds true for Payroll/Operations. To make things more interesting, position control-contract is presently neither with Business Services nor Payroll/Operations - it is with the Personnel Director's secretary, who in turn would like to see position control-contract removed from her auspices, yet would like to maintain control of the Board Docket.

As noted in the Radical and Moderate alternatives, it is recommended that position control-contract, including the Board Docket, be internal to, and overseen by Payroll/Operations to avoid duplication of effort and flow-bottlenecks as position control for hourly personnel is already a responsibility of the Operations section. Theoretically, it would be the responsibility of a Position Control Coordinator - this would require the development of a new position or it could possibly be assumed by an incumbent of Payroll/Operations.

This does not necessarily mean, however, that Payroll/Operations "wins" and Business Services "loses." Business Services' concern in wanting position control-contract under their jurisdiction is that they state they are presently not getting vital information from Personnel Services. Evidently, what Business Services needs to know is when and how long a position is vacant. However, this information can be obtained from the:

a. Labor Distribution, and

b. PP574 Reports (bi-weekly)

(IMPORTANT - SEE: "Labor Distribution Flow Chart," Appendix, Figures XII.1 through XII.4).

NOTES (continued)

15. Lawler, Edward E. III, and Rhode, John Grant, Information And Control in Organizations, pg. 4 (copyright 1976, Goodyear Publishing Company, Inc.)

16. It should be noted at this point that the concepts of organizing by function and organizational growth by function have been concerns of the Board of Trustees in the past. See: "Board of Trustees, NO. 402.1-402.4, Subject: Plan for reducing costs in preparation for the 1979-80 college year, 'Approach cost reduction in District management services by utilizing the principle of "focusing" and deleting or combining functions.'"

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